


Accreditation Conversation

DAN COOPER
RIDEAU VALLEY
CONSERVATION
FOUNDATION



Who is Imagine Canada?

Who we are

Imagine Canada exists to work alongside other charitable sector organizations — and often in partnership with the private sector, governments and individuals in the community — to ensure that charities continue to play a pivotal role in building, enriching and defining our nation.



What is the Standards Program?

Strengthen your Organization. Showcase your Excellence.

The Standards Program awards accreditation to Canadian charities and nonprofits that demonstrate excellence in [five areas of operations](#). To date, more than [200 organizations](#) have invested in trust!

Why all the hype?

Charities and nonprofits join the Standards program to bolster trust in their organization, showcase the Accreditation Trustmark to supporters, and to be seen as leaders. Accredited organizations also tell us that the Standards Program has identified and reduced organization risk, improved board governance practises, and fostered a strong work force.

Do you have to be accredited if you are a Canadian charity?

NO

Why do it?

Started almost entirely to promote ourselves as a trust worthy charity to our donors

- We had no concerns internally about our practices
- We were audited annually
- Board is comprised of community leaders
- Staff is qualified
- We have reasonable resources to complete our mission



What's Involved?

The 73 Standards are focused into five areas:

- Board Governance
- Financial Accountability and Transparency
- Fundraising
- Staff Management
- Volunteer Involvement

The Rideau Valley Conservation Foundation had to prove that they followed these 73 standards.

Examples of Standards

The application form included many questions:

Board Governance

- Typical mission and vision statements
 - Are the mission and vision reviewed annually?
- How is the Executive Director hired
- What is the succession plan
- Employee orientation
- ED job description
- How is employee compensation decided
- Last time the board approved it
- Review of budget and expenses
- Risk assessment
- Insurance review
- Review that you are in compliance with its own governing documents
 - By-laws
 - Letters patent
- Does the board hold a sufficient number of meetings each year
- Minimum # of board members
- Re-enforcing the reminder that no board members should be paid in any way
- Board orientation
- They reviewed a few samples of our minutes

Financial Accountability and Transparency

- Reminder of the need for charities with over \$1 million to have audited statements
- That the statements are reviewed/received and approved by the Board
- Knowledge of T3010 (charitable tax return)
- Approval of annual budget and intermittent review of revenues and expenses
- **Twice annual review of remittances**
- Review of administrative costs
- Organizations with over \$100,000 in investments requires a review committee
- **Documents including financial statements are available publicly**
- **Website disclosure of payments made to Board members or their companies for services rendered**

Fundraising

- Honour donor's request to limit amount of contacts in a year
- **Do not sell your donor list**
- Honour requests for anonymity
- That charitable receipts are issued in compliance with regulations
- Follow the Income Tax Act
- **We do not pay 3rd party fundraisers**
- Awareness of responsibilities relating to anyone receiving funds from your charity
- Understand policies relating to designated funds
- Naming of funds
- **Conduct of people fund raising on your charity's behalf**
- Disclosure of relationships and agreement with 3rd party marketers

Staff Management

- HR policies
- Employee hiring practices
- Employee performance objectives
- Employee performance assessments

Volunteer Involvement

- Volunteer support/supervision
- **Volunteer orientation**
- **Volunteer screening**
- Volunteer recognition

Pros and Cons

Cons:

- It takes a solid year's or more worth of attention.
- The Board has to approve each policy amendment or new policy.
- It's expensive for us. We have less than \$20k operating budget
- \$75/month while you're in the application phase and \$1000 for 1st year for membership

Pros:

- You can operate with the confidence that you are conducting your business at industry standards
- Provides great guidance as most people aren't trained to be a charity
- We get to use the Accreditation Symbol on your products
- We hope that someday this gives us a competitive advantage

Would I do it again?

Yes!

